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Service Entry Overview

🕒 Jun 3, 2022 · Knowledge

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TIP: Learn more in the [Service Entries \(/s/article/Service-Entries-Training-Video\)](#) training video, and see the explanation of maintenance terminology in the [Service Tasks vs. Issues, Service Entries vs. Work Orders \(/s/article/Service-Tasks-Vs-Issues-Service-Entries-Vs-Work-Orders\)](#) .

Service Entries are a simple way to log completed [Service Tasks \(/s/article/Service-Task-Overview\)](#) and [Issues \(/s/article/Issues-Overview\)](#) - the routine Preventative Maintenance and one-time repairs that are performed on Fleetio vehicles. **Service Entries** are a fast and easy, yet still powerful, way to keep track of service history and maintenance expenses.

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Service Entries work in conjunction with [Service Reminders \(/s/article/Service-Reminders-Overview\)](/s/article/Service-Reminders-Overview) to help you stay on top of scheduled tasks.

NOTE: [Work Orders \(/s/article/Work-Order-Overview\)](/s/article/Work-Order-Overview) (an [Advanced Plan \(https://www.fleetio.com/manage/pricing\)](https://www.fleetio.com/manage/pricing) feature) are a more robust way to record service, allowing for greater detail, but not as fast and simple as Service Entries. A completed Work Order will automatically generate a Service Entry, therefore Work Order data will appear along with Service Entry data in Fleetio Service History Lists and Reports.

Add a Service Entry

There are a number of ways to initiate a new Service Entry, including:

- The Quick Add Menu (top right corner of the Fleetio window) > Service Entry
- Services > Service History > + Add Service Entry button
- Reminders > Service Reminder > More Actions menu > Enter Service
- Issues > Issue List > More Actions menu > Resolve via Service Entry
- Vehicles > Vehicle List > Vehicle Overview > + Quick Add button > New Service Entry, or via the More Actions options in the Issues or Service Reminders areas

Service Entry Sections

A new Service Entry is divided into four main sections, to include:

1. Service Details
2. Issues
3. Line Items
4. Attachments/Comments

1. Service Details

Initiate a new Service Entry via any method described above, then begin by entering basic information.

- Select the **Vehicle** (a)
- Identify the [Repair Priority Code \(/s/article/Maintenance-Categorization-With-VMRS\)](/s/article/Maintenance-Categorization-With-VMRS), if enabled (b)
- Enter the **Odometer** reading at the time of service (c) and note the optional checkbox to [Mark as Void \(/s/article/Meter-Entry-Mark-As-Void-Unmark-As-Void\)](/s/article/Meter-Entry-Mark-As-Void-Unmark-As-Void).
- Enter a [Secondary Meter \(https://help.fleetio.com/help/s/article/Meter-Overview#secondary-meter\)](https://help.fleetio.com/help/s/article/Meter-Overview#secondary-meter), if enabled (d)

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- Select the **Completion Date** (e)
- Note the optional checkbox to **Set Start Date** (f) which you may enable if the service took more than one day
- If you use any external identifier, such as an invoice number, you may enter it in the **Reference** field (g)
- A Service Entry may be associated with any **Vendor** which has [Service Classification \(/s/article/Vendor-Classification\)](/s/article/Vendor-Classification) (h) so that you may track and report costs associated with this Vendor for services provided
- **Labels** offer powerful sort and filter capabilities in Lists and Reports (i)
- Any [Custom Fields \(/s/article/Custom-Fields-Overview\)](/s/article/Custom-Fields-Overview) you have established for the Service Entry record type will also display in this section

Details

Vehicle * **a**

2001 Chevy G Series 1500

Repair Priority Class **b**

Please select

Repair Priority Class (VMRS Code Key 16) is a simple way to classify whether a service or repair was scheduled, non-scheduled, or an emergency.

Odometer * **c** mi .Void

Secondary Meter * **d** hr .Void

Last updated: 208,005 mi (4 months ago) Last updated: 69,010 hr (6 months ago)

Completion Date **e**

Set Start Date **f**

Reference **g**

Vendor **h**

Please select

Labels **i**

Please select

2. Issues

The **Issues** section of the new Service Entry shows all Issues associated with the Vehicle you selected above.

- View Issues by **Status** (j) and check the boxes for any Issues you wish to include (k).

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- Add a **NEW Issue** on the fly via the **+ Add Issue** link (l).
- Link to Line Items by selecting the appropriate line item (m).

Issues + Add Issue

Open Resolved Closed

Select any issues that were resolved as part of this service

Issue	Summary	Linked Line Items	Status	Labels	Assigned	Work Or
<input type="checkbox"/>	#300 Clutch	+ Link to Line Items	Open	—		—
<input type="checkbox"/>	#224 Boom cover damaged	+ Link to Line Items	Open	—		—
<input type="checkbox"/>	#223 Inspection expired	+ Link to Line Items	Open	—		—

NOTE: When you **Save** the Service Entry, any included **Open Issues** are automatically updated to **Resolved** status.

You can also link **Issues** to **Service Tasks** in the **Line Items** section, explained below.

3. Line Items

Add **Service Tasks** to the Service Entry in the **Line Items** section.

- Here, you can **View Service Reminders** for the currently selected Vehicle (n)
- Click in the **Search** box (o) to select from the entire Service Task list

Once the Service Task has been added, more options will be revealed.

- Enter a **Labor cost** and/or **Parts cost**, which will automatically sum as **Subtotal**, and allows for detailed cost accounting with a labor/parts breakdown on a "per line item" basis (p)
- Change the Task entirely by clicking the **Edit** icon (q)
- If there are **Open Issues** assigned to the Vehicle, click to **link** these to the Service Task (r). If there are already issues linked to the Service Entry, you can view them below (v)
- If a **Service Reminder** has already been established for this Vehicle/Task, the details will appear with quick access to **Edit** (s), otherwise a link will be available to **+ Create Service Reminder**
- Click the miles or kilometers remaining to view a Meter forecast (t)
- An optional Notes area provides space for notes specific to this Task (u)

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The screenshot shows the 'Line Items' section of a service entry overview. At the top, there is a search bar for 'Search Service Tasks...' and a 'View Service Reminders' button with a red notification badge showing '40'. Below the search bar, there are columns for 'Labor', 'Parts', and 'Subtotal'. The first line item is for a vehicle '012445 FireHawk Indy 500 BL 255/35R18 XL94W No'. It shows a status of 'No' and a 'Last Completed' date of '1 month ago'. Below the vehicle information, there is a 'Link Issues' button and a text area for 'Add notes or additional details'. A 'LINKED ISSUES (1)' section shows a linked issue '#767 · [Inspection] No remark required' with a description: 'Generated by the failed inspection item "No remark required" on the "MOBILE SQUAD - Pass / Fail" form submitted by Nick Redfoot on Apr 15, 2020 at 3:57 PM'. The second line item is 'Brake Inspection', also showing 'Last Completed: 1 year ago' and a distance of '598,925,276 km from now'. It also has a 'Link Issues' button and a text area for notes.

Beneath the Service Task list and details, enter summary notes and cost information.

- The **General Notes** area (w) allows for notes which apply to the Service Entry overall (as opposed to the notes associated with the line item, shown above)
- Apply a **Percentage** or **Fixed Discount. Taxes** will default to the rates set in your [Account Settings \(/s/article/Account-Settings\)](/s/article/Account-Settings) (x)
- As with the Subtotals, a sum **Total** will calculate automatically from values above.

The screenshot shows the 'General Notes' and 'Cost Summary' sections. The 'General Notes' section has a text area for 'Add notes or additional details'. The 'Cost Summary' section is a table with the following data:


Labor		\$75.00
Parts		\$129.00
Subtotal		\$204.00
Discount	% ▾ 0.0	\$0.00
Tax	% ▾ 0.0	\$0.00
Total		\$204.00

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4. Attachments/Comments


Finally, upload any **Attachments** (Images and/or Documents) (y) to provide quick access to receipts, invoices, warranty paperwork, or damage photos. Enter **Comments** (z) for internal tracking and communication, and **Save**.

Photos



Drag and drop files to upload
or click to pick files

Documents



Drag and drop files to upload
or click to pick files

Comments

MS





Cancel
Save & Continue Editing
Save Service Entry

Service History

The Service History page provides a summary of Service Entries for vehicles. To access the page, click **Service History** under the Service menu. Here, you can view pending and completed service entries, view and filter detailed information on service entries, import, [export a list to CSV](https://help.fleetio.com/help/s/article/Working-With-Your-Data-on-a-List-Page#export-list) (<https://help.fleetio.com/help/s/article/Working-With-Your-Data-on-a-List-Page#export-list>) and [Add a New Service Entry](#).

Service History + Add Service Entry

Search Vehicle Vehicle Group Service Tasks Watcher Filters 1 - 50 of 1,645

Vehicle	Completed	Watchers	Repair Priority Class	Meter	Service Tasks
<input type="checkbox"/>  0M4HH0	2022-03-22 15:09	2 watchers	—	—	—
<input type="checkbox"/>  0M4HH0	2022-03-22 14:43	3 watchers	—	—	012445 FireHawk Indy 500 Bl, 255/35R18 XL94W No
<input checked="" type="checkbox"/>  2007 John Deere Tractor (INYHR)	2022-03-18 15:58	4 watchers	—	—	A/C Accumulator Replacement - name edit on import, and sometimes our customers make crazy long names for these
<input type="checkbox"/>  2009 GMC Sierra 1500 Crew Cab (GPB9W)	2022-03-10 11:24	5 watchers	—	164,241 mi	Oil/Filter Change Engine Oil Level Inspect

Service Summary Report

Navigate to **Reports Service Service Summary** for a summary of Service Entry costs. **Chat with an Expert**

The **Total** value is the sum of every Service Entry subtotal. The **Parts** and **Labor** columns only count subtotals that are classified as Parts and Labor respectively.

Thus, Parts + Labor = Total only if ALL Service Entries in the results are itemized for Parts and Labor, and do not include other costs or manually entered Totals.

EXAMPLE:

Service Entry 1 has \$10 for Parts, \$10 for Labor, so its Total = \$20

Service Entry 2 has \$0 for Parts, \$0 for Labor, but it has an entered Total of \$20

A Service Summary Report for those 2 entries would show Parts total = \$10,

Labor total = \$10, and Total = \$40

Reports / Service Summary Report Save Export CSV Print

0 filters applied 1-3 of 3

Vehicle	Group	Type	Status	Last Service Date	# Service Entries	# Service Tasks	Duration	Labor	Parts	Tax	Total
01-F150	Team A	Truck	Active	2018-09-18	3	3	0m	\$35.00	\$79.00	\$0.00	\$114.00
A01	Team B	Car	Active	2018-08-06	1	1	6d 7h 46m	\$0.00	\$33.99	\$0.00	\$33.99
A03	Team A	Car	Active	2018-09-19	1	1	0m	\$0.00	\$0.00	\$0.00	\$0.00

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[Service Entries \(ADVANCED\) Import Guide \(/s/article/Service-Entries-Advanced-Import-Guide\)](/s/article/Service-Entries-Advanced-Import-Guide)

[Service Reminders Overview \(/s/article/Service-Reminders-Overview\)](/s/article/Service-Reminders-Overview)

[Service Programs Overview \(/s/article/Service-Programs-Overview\)](/s/article/Service-Programs-Overview)

[Edit Shop Integration Service Entries \(/s/article/Edit-Shop-Integration-Service-Entries\)](/s/article/Edit-Shop-Integration-Service-Entries)

[Meter Entry - Mark as Void, Un-mark as Void \(/s/article/Meter-Entry-Mark-As-Void-Unmark-As-Void\)](/s/article/Meter-Entry-Mark-As-Void-Unmark-As-Void)

[Print Invoice for Shop Integration Service Entry \(/s/article/Print-Invoice-For-Shop-Integration-Service-Entry\)](/s/article/Print-Invoice-For-Shop-Integration-Service-Entry)

[View Shop Integration Service Entries \(/s/article/View-Shop-Integration-Service-Entries\)](/s/article/View-Shop-Integration-Service-Entries)

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